

**Yadong Group Holdings Limited**  
**SHARE OFFER**

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<b>Offering Structure</b>	
<b>Issuer:</b>	Yadong Group Holdings Limited
<b>Ticker:</b>	1795.HK
<b>Type of Offering:</b>	Placing and Public Offer of Shares on the Main Board of the Hong Kong Stock Exchange ("HKEX")
<b>Base Offering:</b>	150,000,000 Shares (subject to the Over-allotment Option)
<b>Offering Structure:</b>	<ul style="list-style-type: none"> <li>Placing Shares 90% – 135,000,000 Shares (subject to adjustment and the Over-allotment Option);</li> <li>Public Offer Shares 10% – 15,000,000 Shares (subject to adjustment).</li> </ul>
<b>Offer Price Range:</b>	HK\$0.84 -HK\$1.08 per offer share
<b>Base Offer Size:</b>	HK\$126,000,000 – HK\$162,000,000
<b>Over-allotment Option:</b>	22,500,000 Shares, representing 15.0% of the Base Offering
<b>HKPO Clawback:</b>	<ul style="list-style-type: none"> <li>15-50 times, 30% of the base offering;</li> <li>50-100 times, 40% of the base offering;</li> <li>100 times above, 50% of the base offering.</li> </ul>
<b>Board Lot:</b>	3,000 Shares
<b>Selling Restrictions:</b>	Reg S
<b>Use of Proceeds:</b>	<ul style="list-style-type: none"> <li>63.1% of the net proceeds will be used for expansion of production capacity and product coverage by means of upgrading and improving existing production lines and technical capabilities;</li> <li>26.9% of the net proceeds will be used for the expansion of the production capacity by means of acquisition of a controlling interest, if not the entire interest, of a company with existing production plant with an annual production capacity of approximately 10 million metres to 15 million metres in Jiangsu province, the PRC;</li> <li>10% of the net proceeds will be used for the general corporate purposes and working capital;</li> </ul>
<b>Brokerage, Levy and Trading Fee:</b>	<ul style="list-style-type: none"> <li>Brokerage: 1.00%</li> <li>SFC Transaction Levy: 0.0027%</li> <li>SEHK Trading Fee: 0.005%</li> </ul>
<b>Timetable (Subject to Change):</b>	October 30, 2020      Placing Book opens, HKPO begins November 6, 2020, 12:00 pm      HKPO Ends November 17, 2020      Pricing, Allocation November 18, 2020      Listing, Settlement
<b>Prospectus:</b>	<a href="https://www1.hkexnews.hk/listedco/listconews/sehk/2020/1030/2020103000065.pdf">https://www1.hkexnews.hk/listedco/listconews/sehk/2020/1030/2020103000065.pdf</a>

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